CHRIS Training Workflow Instructions for Employees

Purpose:

CHRIS Training Workflow allows employees to electronically request and route training requests and for managers to electronically approve training actions online. The following information outlines the basic steps that must be taken to approve training actions.

Logging On:

Step 1: Log on to Employee Self Service (ESS) at https://mis.doe.gov/ess.
Step 2: Click the CHRIS/PeopleSoft menu item. The Connect to CHRIS/PeopleSoft Screen is displayed.
Step 3. Click the Connect to CHRIS button and the Main CHRIS Workflow screen should be displayed.

Note: Employees may receive the following PeopleSoft Error message: Webserver appears to be incorrectly configured. If this message is received, close the window by clicking the X button in the upper right-hand corner. Then click the Connect to CHRIS button on the previous screen and the Main CHRIS Workflow screen should be displayed.

Setting Up an Employee Training Workflow Profile:

Step 1: Navigate to "Employee Training Workflow Profile" by clicking on CHRIS Workflow > Training > Setup > Empl Training Workflow Profile.
Step 2: Click on the magnifying glass under the "Approver" column next to the Approver 1 row.
Step 3: Enter the approver's last name in the "Last Name" field and click on the "Lookup" button. All approvers with that last name will appear.
Step 4: Click on the appropriate approver's name. This will populate the Approver field.
Step 5: Continue steps 2 through 5 to complete each role in the Approver profile until you have completed your Profile.

Caution: If no approver is required for a specific step, employees should check the "Skip" box next to that approver row. This must be done for training requests to be routed correctly.

Step 6: Click on the "Save" button.

Initiating a Training Request:

Step 1: Navigate to "Employee Training Request" by clicking on CHRIS Workflow > Training > Training Requests > Create/Modify Training Request.
Step 2: To create a training request, click on "Create Request," or to view your training history, click on the arrow tabs.
Step 3: Complete the Training Request online by filling out all the necessary fields on the "Training Request" and "Approval Routing" screens. Things to be aware of:

a. Attendance field will default to "Request."
b. For an internal course:
   1) Click on the "DOE Class" button;
   2) Click on the "Refresh" button;
   3) Locate the class you wish to attend, and click on the box to the left of the class; and
   4) Scroll to the bottom of the page and click on the "OK" button.
c. For an external course, provide the Course Title, Begin/End Dates, Training Reason, Objectives, Vendor information, costs (including estimated associated travel costs), and other pertinent information.
d. Because an e-mail is immediately generated for approval upon saving the training request, do **not** save a Workflow entry until the **ENTIRE** training request has been completed including both the "Training Request" and the "Approval Routing" screens.

Step 4: Click on the "Approval Routing" tab when all information has been provided on the Training Request page.
Step 5: Click on the magnifying glass for a list of valid approvers. (The approvers shown are automatically populated if an Employee Profile has been created.)
Step 6: Click on the "Save" button at the bottom of the page to submit the training request. This will notify Approver 1 by email that you requested training.
Step 7: Click on the "Sign Out" button to exit the system.
Step 8: You will receive an email when your training has been approved/disapproved.

<u>Canceling a Training Request:</u>

Step 1: Navigate to "Cancel Training Request" by clicking on CHRIS Workflow > Training > Training Requests > Create/Modify Training Request.
Step 2: Locate the training request by using the navigation arrows on the right hand side of the screen.
Step 3: If your training request is still in the approval cycle, you will see a cancel request check box directly below your name.
Step 4: Click the check box and the system will prompt you to enter your cancellation reason and then click okay.
Step 5: Scroll to the bottom of the page and click the "Save" button.
Step 6: If you do not see the cancel request check box, please send an email to the Training & Development Department (T&DD) (TRC email address is training@doeal.gov) and carbon copy (cc) your supervisor. In the email, please list your training cancellation reason.

<u>Submitting a Training Evaluation OR Completion Documentation:</u>

Step 1: You will receive an email, which contains a training evaluation form for the course in which you have been enrolled.
Step 2a: After the training has been completed, you will have 3 weeks to complete and send in the evaluation form **<u>OR</u>** send in completion documentation.
Step 2b: If you have not submitted the training evaluation form **<u>OR</u>** completion documentation, you will receive a reminder email message and will have 3 additional weeks to send in the documentation.
Step 3a: When T&DD receives the evaluation form **<u>OR</u>** completion documentation, your status will be updated in CHRIS to show completion.
Step 3b: If the evaluation form **<u>OR</u>** completion documentation is not received by the end of the 6-week period, your status will be marked "Incomplete/Dropped."
Note: Employees' status will be changed to "Complete" once completion documentation is provided.

<u>Hotline Help:</u>
**Access problems with your CHRIS Workflow user ID or password should be sent via e-mail to: chrissecurity@netl.doe.gov.
**Contact the Training and Development Department for questions concerning procedures and general operational assistance.

Your Training Contact is:____